



MEDICAL INSIGHT[®]

THE Global Aesthetic Market Study: Version XVI

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M.I.I.

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Michael Moretti has served as a medical industry analyst and strategic advisor for more than 25 years. As an industry consultant, Mr. Moretti specializes in strategic business development projects and high-growth, emerging market segments. He provides custom reports and confidential market studies for a variety of clients, including global medical and pharmaceutical companies.

In 1993, Mr. Moretti founded Medical Insight, Inc., the leader in focused aesthetic market research offering comprehensive data on procedure volume and growth, revenue forecasts and new product introductions. Under Mr. Moretti's leadership, Medical Insight publishes global market studies and forecasts for major industry sectors such as facial injectables, cosmeceuticals, body shaping procedures, skin rejuvenation technologies and home-use aesthetic products. Medical Insight also sponsors executive business forums to address scientific developments and market trends for the investment community.

Mr. Moretti is the founder of *Aesthetic TV*, the first and only one-stop online resource for current, reliable information about cosmetic and anti-aging treatments. *Aesthetic TV* offers expert advice for consumers via interviews with the top physicians in the field, and unprecedented access to the latest beauty-enhancing procedures and products created specifically to help people look and feel their absolute best.

Mr. Moretti is also founder of *THE Aesthetic Guide*[®] – a digital and print publication from Medical Insight featuring in-depth reports on new products, procedures and trends, reaching over 75,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European and Asian markets.

In 2007, Mr. Moretti debuted *THE Aesthetic Show*, the first multidisciplinary annual business to business trade show that brings thousands of the highest profile physicians and medical professionals together in Las Vegas to learn about the newest aesthetic procedures, products and technologies in a dynamic, interactive, educational format. For more information please visit: www.miinews.com.

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i. Methodology

The Global Aesthetic Market XV (GAM XV) represents the fifteenth edition in Medical Insight, Inc.'s Global Aesthetic Market series. This report was compiled from a wide variety of public and proprietary sources. Information was cross-checked against other data, using Medical Insight's proprietary forecasting models, and synthesized into both qualitative and quantitative analyses and projections, specifically covering medical aesthetic products and equipment; products and equipment designed for therapeutic usage, even when they are produced by leading aesthetic companies, are not included. Therefore, new devices for instance, such as the treatment of onychomycosis are excluded.

Public sources that were utilized for this report include:

- articles in trade publications and medical journals;
- articles in consumer magazines and newspapers;
- company news releases, website information, marketing materials and financial filings;
- information from trade associations

Proprietary sources that were utilized include:

- Medical Insight's extensive database of industry and product information;
- recent Medical Insight survey data;
- industry analyst reports;
- exclusive interviews with company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

Additionally, feedback from Medical Insight product information is continually built back into research products so that reports are updated with the most recent industry and market information on an ongoing basis.

ii. New in June 2018

GAM XVI offers an in-depth analysis of the competitive positions of key players in all segments with details obtained from recent interviews.

In addition to the latest industry news and updated market forecasts, which take into account recent technology, product, company, regulatory and other developments, GAM XVI also contains:

- Extension of sales forecasts from 2017 to 2022;
- comparison of current forecasts to GAM XV forecasts and discussion of changes;
- analysis of cultural, economic and other factors impacting the aesthetic market, particularly in the U.S. and Europe

Section**1****Executive Summary**

In 2017, total sales of professional aesthetic products covered in this report, including disposable components, approached \$10 billion. Through 2022, they will expand by 11% per year to \$16.8 billion. This is higher than the compound annual growth (CAGR) of 10.5% predicted in GAM XV released in May 2017, as forecasts were adjusted to reflect the ongoing global economic instability, and the forecast model for Emerging Technologies was not included. Growth will be driven by significant double-digit increases in the non-invasive feminine rejuvenation, body shaping / skin tightening segment along with continued expansion of cosmetic neurotoxins and dermal fillers. The energy-based devices and physician-dispensed topicals markets will also experience reasonable annual gains of 6.6% and 8.7%, respectively, as growing global demand for these products results in increased sales.

In 2017, total global procedure volume reached 64 million treatments with a CAGR of 6.2% anticipated through 2022. Procedure volume growth will be greatest in feminine rejuvenation, followed by cosmetic neurotoxin, dermal filler sectors and body shaping / skin tightening. In 2017, total global procedure fees were about \$29 billion, with compound annual growth predicted of 5.1% through 2022. Procedure fee growth will be greatest in the feminine rejuvenation segment, followed by cosmetic neurotoxin, dermal filler sectors and body shaping / skin tightening sectors.

Figure 6-8
Change in Market Shares of Top Dermal Filler Suppliers
2017 – 2022
June 2018

